

Evergreen Version 3.2 Technical Services Exercises

EXERCISE 1: ADD A CALL NUMBER AND ITEM TO AN EXISTING BIBLIOGRAPHIC RECORD

Objectives: Add a call number and an item to an existing bibliographic record using the Holdings View screen.

Scenario: You received a new item that needs to be added to the catalog. You searched the catalog and found an existing bibliographic record but your library has no current copies. Create a call number and an item for your library.

Materials required: None

1. Search the catalog for an existing bibliographic record and click the title to go to the details page. (Write down the barcode in the notes below.)
2. Go to the **Holdings View** tab.
3. Check that the **Holdings View** scope is set to the library system. (WEST)
If it is not, select your library system from the **Show holdings at or below drop down menu. The holdings will adjust to show your system. The Holdings Editor will open in a new tab.
4. Enter the number of call numbers you need in the **Call Numbers** box (Default is 1).
5. Enter the call number in the **Call Number Label** box.
6. Enter the number of items you wish to add (Default is 1)
7. Enter the barcode in the **Barcode** box (write the barcode in the notes area below)
8. Add attributes to your copy with the Item Editor for shelving location, circulation modifier, and price.
9. Click **Save & Exit**
10. The display will return to the **Holdings View** screen, where you can review your new copy. (You may need to refresh your screen for the copy to appear.) The new item will remain in a status of "In Process" until checked in.
11. [Optional - Repeat steps 1-10 for additional practice.]
12. Go to **Circulation > Check In** and enter the item barcode to check it in. The item will move to a new status of "Available" or "Reshelving."

Notes: _____

EXERCISE 2: CHANGE THE STATUS OF AN ITEM TO DAMAGED

Objectives: You need to change the status of the item to Damaged.

Scenario: A damaged item needs to be marked damaged so it can be mended.

Materials required: The item barcode that you used in Exercise 1.

1. Go to **Circulation > Item Status**
2. Enter the barcode ID you used in Exercise 1.
3. Click the checkbox next to the item to select it, then right-click on the item in the list (or click the **Actions** button).
4. Choose **Mark Item as Damaged**.
5. In the pop-up window, click **Submit** to confirm the action.

Notes: _____

EXERCISE 3: USE BUCKETS TO MANAGE AND ORGANIZE ITEMS

Objectives: Use a bucket to change the status of items in batch.

Scenario: You have been collecting items in a bucket for use in a display. It is time to set up the display, so you need to change the shelving location for your bucket items to “Items on Display.”

Materials required: 3-4 item barcodes.

1. Go to **Cataloging > Item Buckets**
2. In the **Bucket View** tab, click on the **Buckets** drop-down menu and select **New Bucket**
3. Enter your first name to name the bucket. You may also enter a description, if desired. Click **Create Bucket**.
4. Move to the **Pending Items** tab and enter the item barcodes. The items should appear in the list of pending items.
5. Use the checkbox next to each item to select the item or use the checkbox at the very top of the list to select all items at once. Right-click, or use the **Actions** drop-down menu and choose **Add to Bucket**.
6. Move back to the **Bucket View** tab
7. Use the checkbox next to each item (or select all). Click the **Actions** button (or right-click on the list) and choose **Edit Selected Items**. This will bring up the item editor. Notice that all the barcodes you selected are listed next to the item attributes portion of the screen.
8. Change the shelving location to *Item on Display* and click **Save and Edit**.
9. Let’s pretend that several weeks have passed and now it is time to return the items to their original shelving locations.

10. From the bucket you created, repeat the previous steps and change the shelving location for all items in the bucket back to *Stacks*.

Notes: _____

EXERCISE 4: CHANGE THE STATUS OF AN ITEM FROM DAMAGED TO AVAILABLE

Objectives: You need to change the status of the item from Damaged to Available.

Scenario: A damaged item that was recently mended is ready to circ again.

Materials required: The item barcode from Exercise 1.

1. Go to **Circulation > Item Status**
2. Enter the item barcode you used in Exercise 1.
3. Select the item and right click, or open the **Actions** drop-down menu.
4. Choose **Edit Items**. The Holdings Editor will open in a new tab.
5. In the **Status** drop-down menu in the Item Attributes section of the copy editor, choose *Available*.
6. Click **Save & Exit**. The Holdings Editor closes and you will view the Item Status tab.

Notes: _____
